



USDA TURKEY MARKET NEWS REPORT

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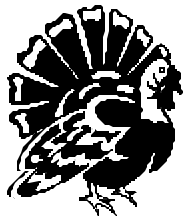
U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

DAILY NATIONAL TURKEY MARKET - AT A GLANCE



DOMESTIC MARKET HIGHLIGHTS

The market tone on frozen 8-16 lb. hens and 16-24 lb. toms was steady. No trading was reported. Demand was very light on prompt and deferred shipments. Offerings adequate. Bulk parts and meats trading was light. Demand was moderate.

EXPORT MARKET HIGHLIGHTS

Trading centered on a moderate volume of tom drums and frozen thigh meat, balance slow. Export demand from Russia, Mexico and Asia noted. Supplies are mixed.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 29, 2003**

CURRENT SHIPMENTS 2/

FORWARD SHIPMENTS 6/

OPEN COMMITMENTS 7/

	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	55.5-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	54.25-57	54.25	54.25	120	61.00	280	SEP	-	-
WESTERN REGION 5/	59-60	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	55-58	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	54.25-56	54.25	54.25	80	61.00	160	SEP	-	-
WESTERN REGION 5/	57	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 30, 2003**

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	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	55.5-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	54.25-57	-	-	-	-	-	-	-	-
WESTERN REGION 5/	58-60	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	55-58	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	54.25-56	-	-	-	-	-	-	-	-
WESTERN REGION 5/	57-58	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days. 3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 29 JULY 2003.

The undertone on fresh white meat was mostly steady with instances of improved seller confidence noted. Inquiry light to fair with some interest noted for prompt shipments. Offerings mixed with some product for immediate deliveries held with more confidence than product for later arrivals. The undertone on frozen white meat was steady to instances weak. Demand slow. Offerings mixed with some sellers reluctant to move frozen white meat at current price levels. Meanwhile, some buyers are cautious about utilizing frozen inventories choosing instead to take advantage of current bargain fresh white meat markets. The undertone on 4-8 lb. breasts was mostly steady with signs of increased strength starting to appear. Demand fair for the light to adequate offerings. Domestic trading moderate on plant grade 4-8 lb. breasts, balance spotty. Fresh wing meat traded at 38 and fresh scapula at 55 cents delivered domestic. Export trading was slow to moderate, best on tom drums. Export demand was moderate with the best interest noted on drums and thigh meat. Some tom defatted gizzards traded at 49 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		M	85.33	120
BREASTS, 4-8 LBS GRADE A—FRESH 2/				
BREASTS, 4-8 LBS PLANT GRADE 2/	78.00-81.00		79.60	400
DRUMSTICKS, TOM		R	24.77	130
DRUMSTICKS, TOM—FRESH		M	26.00	80
DRUMSTICKS, HEN		F	23.00	13
WINGS, FULL-CUT, TOM		M	20.00	40
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM		R	25.00	15
WINGS, V-TYPE, HEN		R	54.00	3
NECKS, TOM		R	16.51	215
NECKS, HEN				
BREASTS, B/S, TOM 3/		W	103.00	60
BREASTS, B/S, TOM—FRESH 3/	118.00-123.00		119.50	240
THIGH MEAT				
THIGH MEAT—FRESH		F	52.00	20
BREAST TRIM MEAT				
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS		W	86.00	10
DESTRAPPED TENDERS—FRESH	112.00		112.00	72
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/	15.00		15.00	40
MECHANICALLY SEPARATED—FRESH 4/	17.00-19.00		18.00	120

EXPORT TRADING

DRUMSTICKS, TOMS	25.00-26.00		25.63	580
WINGS FULL-CUT - TOMS		F	19.00	104
WINGS, V-TYPE, TOM	23.00		23.00	156
TAILS		R	15.83	380
MECHANICALLY SEPARATED 4/	16.00		16.00	40
THIGH MEAT - FROZEN	51.00		51.00	104

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED

TURKEY,

DELIVERED TO RETAILERS

	RANGE
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	66
FROZEN TURKEYS Y TOMS 14-24#	63-65
FROZEN TURKEYS Y TOMS 24-28#	65-72

SAN FRANCISCO PROCESSED TURKEY

DELIVERED TO RESTAURANTS AND INSTITUTIONS

	RANGE
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 30 JULY 2003.

The trade sentiment on tom bulk parts was steady to fully steady on drums and full-cut wings, necks mostly steady. Tom bulk parts inquiry was moderate to good on drums, full-cut wings fair, 2-joint wings light to fair and light on necks. The undertone on hen bulk parts was mostly steady for the light to adequate offerings. Trading was light on all items. For domestic: fresh breast trim 52, plant grade basted 14-16 lb. breasts 80, sized frozen tom breast meat to be produced 118 cents delivered. Some livers traded at 17 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		M	85.33	120
BREASTS, 4-8 LBS GRADE A—FRESH 2/				
BREASTS, 4-8 LBS PLANT GRADE 2/		T	79.60	400
DRUMSTICKS, TOM	26.00		26.00	10
DRUMSTICKS, TOM—FRESH		M	26.00	80
DRUMSTICKS, HEN	24.00		24.00	40
WINGS, FULL-CUT, TOM	20.00		20.00	10
WINGS, FULL-CUT, HEN	21.00		21.00	10
WINGS, V-TYPE, TOM		R	25.00	15
WINGS, V-TYPE, HEN		R	54.00	3
NECKS, TOM	18.00		18.00	10
NECKS, HEN				
BREASTS, B/S, TOM 3/		W	103.00	60
BREASTS, B/S, TOM—FRESH 3/		T	119.50	240
THIGH MEAT				
THIGH MEAT—FRESH	54.00	54.00	30	
BREAST TRIM MEAT	55.00		55.00	80
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS	82.00		82.00	120
DESTRAPPED TENDERS—FRESH	107.00		107.00	40
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		T	15.00	40
MECHANICALLY SEPARATED—FRESH 4/	15.50-20.00		16.36	110

EXPORT TRADING

DRUMSTICKS, TOMS	25.50-26.00		25.90	392
WINGS FULL-CUT - TOMS	20.00		20.00	108
WINGS, V-TYPE, TOM		T	23.00	156
TAILS		R	15.83	380
MECHANICALLY SEPARATED 4/	16.00		16.00	200
THIGH MEAT - FROZEN	50.00-68.00		56.07	328

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2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

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BREEDER TURKEYS CERTIFIED IN CALIFORNIA W/E 07/23/03

POULTRY HEALTH BOARD	HEAVY	ACCUMULATED HEAVY	ALL BREEDS
SEASON			
JULY 1 TO JUNE 30	WHITE	WHITES	
2003-2004	15,513	17,180	17,180
2002-2003	36,854	36,854	36,854